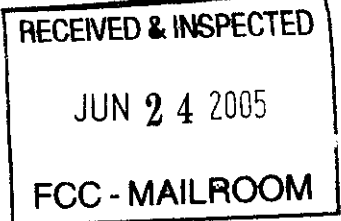


**Before the
FEDERAL COMMUNICATION COMMISSION
Washington, D.C. 20554**



In the Matter of)	
)	
Request for Review by Colegio)	
Maria Auxiliadora on Decision of)	Form 471 Application No. 423955
the Universal Service Administrator)	
)	
Schools and Libraries Universal Service)	CC Docket No. 02-6
Support Mechanism)	
)	

TO: Wireline Competition Bureau

REQUEST FOR REVIEW

Pursuant to Sections 54.719(c) and 54.721 of the Federal Communications Commission ("Commission" or "FCC") rules, 47 C.F.R. §§ 54.719(c) and 54.721 (2003), Colegio Maria Auxiliadora ("Maria Auxiliadora") hereby appeals the decision of the Schools and Libraries Division ("SLD") of the Universal Service Administrative Company to reduce the requested discount in Funding Year 2004 (07/01/2004 – 06/30/2005) from 90% to 20%.

I. BACKGROUND

On February 04, 2004, Maria Auxilidora filed an FCC Form 471 with the SLD listing the services for which it was requesting discounts under the schools and libraries universal service support mechanism (the "E-rate program").¹ On August 12, 2004, Maria Auxiliadora received from the SLD the E-rate Selective Review Information Request for funding year 2004². By October 22, 2004, Maria Auxiliadora submitted by fax to the SLD's reviewer the answers

¹ FCC, Form 471 No. 399296 for Colegio Maria Auxiliadora, filed 02/04/2004 (Exhibit A).

² Selective Review from Jay Naik-PIA Selective Review, dated August 12, 2004. (Exhibit B)

concerning the Selective Review.³ Later on during the month of November 03, 2004, Maria Auxilidora was inquired by the Consorcio to provide a socio economical study as per an SLD's PIA reviewer requesting the study for all of the Consorcio School members.⁴ Specifically, the information request, which was delivered to Maria Auxiliadora, requested the following information:

1. The total number of enrolled.
2. Total number of surveys/applications sent out
3. Number of survey/application returned
4. Total number of students that qualifies for the National School Lunch Program, using the Income Eligibility Guidelines (IEG) of the NSLP, per returned surveys/applications
5. Are the surveys/applications and results kept on file.
6. Provide a sample copy of the FILLED OUT SURVEY/APPLICATION with the child's personal information crossed out for confidentiality.
7. A signed certification that reads: "I certify that only those students who meet the Income Eligibility of the National School Lunch Program have been included in Column 5 of item 10b, Block 4 (Worksheet A) of the Form 471."
8. The information must be in writing on the school letterhead and signed by a school official (such as the Principal, Vice – Principal Superintendent, Director of Food Services.

In its response, Maria Auxilidora indicated that there were 475 students enrolled, that 475 surveys/applications were sent out and that 475 surveys/applications were returned. It also indicates from those survey/applications returned 392 students qualifies for the NSLP, that the surveys/applications and its results are kept on file and certified, that only the students who meet the IEG of the NSLP had being included in Column 5 item 10b of block 4 (worksheet A) of the Form 471. Maria Auxiliadora also provided a sample copy of the socio-economic survey. On the

³ See Response to Selective Review sent by fax addressed to Jay Naik-PIA Selective Reviewer, dated October 22, 2004 (Exhibit C).

⁴ See fax addressed to Madeline Melgen from Nancy Rocco, PIA Reviewer, dated November 03, 2004 (Exhibit D).

socio economical study provided, Maria Auxiliadora provided evidence that qualifies the school for a 90% of discount.⁵

On January 24, 2005 and February 14, 2005 the PIA requested additional information regarding the Selective Review,⁶ requesting additional information on Professional Development and validation of new Director at the school, respectively. Maria Auxiliadora complied immediately answering on January 26, 2005 and February 15, 2005.⁷

On May 10, 2005, Maria Auxiliadora received a Funding Commitment Decision Letter stating as the decision and explanation to deny the requested discount the following statements⁸: *Svrc/Discnt will NOT be funded. The site-specific discount was corrected. Given demand, the funding cap will not provide for Internal Connections at your approved discount level to be funded.*

II. MARIA AUXILIADORA SUSTAINED ITS ELIGIBILITY FOR THE SERBVICES AND THE 90% PERCENT DISCOUNT BEING REQUESTED ORIGINALLY ON FORM 471 APPLICATIONS.

The SLD states in the FCDL that *Svrc/Discnt will NOT be funded. The site-specific discount was corrected. Given demand, the funding cap will not provide for Internal Connections at your approved discount level to be funded.* On April 29, 2005, the SLD published on its Website that will continue to fund approved Funding year 2004 requests at discount percentages of 81% and above and will deny funding requests with discount

⁵ See letter dated December 10, 2004 (Exhibit E)

⁶ See fax addressed to Madeline Melgen from Carlos Alvarez, PIA Reviewer, dated January 24, 2005 (Exhibit F) .

⁷ See fax addressed to Madeline Melgen from Carlos Alvarez, PIA Reviewer, dated February 14, 2005 (Exhibit G)

⁸ See letter from Schools and Libraries Division, Universal Service Administrative Company dated May 10, 2005

percentages of 80% and below⁹. Maria Auxiliadora provided all the information and documentation the PIA requested during the applications selective review. Such information and documentation was sufficient to validate Maria Auxiliadora eligibility for the services solicited and the percentage discount requested.

III. THE SLD ERRED IN FAILING TO FOLLOW FCC PRECEDEN THAT REQUIRES THE SLD TO CONTACT MARIA AUXILIADORA TO REQUEST DOCUMENTATION TO SUPPORT THE REQUESTED DISCOUNT TO SUPPORT THE REQUESTED DISCOUNT THEREFORE, THE SLD ERRED ON DENYING THE SCHOOL FUNDING FOR INTERNAL CONNECTIONS.

In answering the PIA selective review questions, Maria Auxiliadora provided the PIA reviewer the information and/or documentation requested. Such information/documentation demonstrated the eligibility for the requested discount. In the event the SLD, when evaluates the documentation provided by the applicants, any doubt or issue arise should ask for additional information and/or documentation to clarify such doubt or concern. In this case the SLD did not requested Maria Auxiliadora additional information, thus the SLD denied the applicant the opportunity to provide documentation to support statement in their review.

Consistent with the information posted at

<http://www.sl.universalservice.org/reference/AppealsSLDGuidelines.asp>, item 3 clearly states that: “When the appeal provides documentation to correct an incorrect SLD assumption made because there was insufficient information in the application file about an issue. In general, PIA will contact the applicant and ask for all information necessary to make decisions about an application. If that contact does not occur, however, and funding is denied based on an incorrect assumption, the SLD will grant an appeal when the appellant points out the incorrect assumption

⁹ <http://www.sl.universalservice.org/whatsnew/2005/042005.asp#042905>

and provides documentation about the issue that is consistent with information originally provided but also successfully resolves the ambiguity in the original file”.

IV. THE SLD ERRONEOUSLY CONCLUDED THAT MARIA AUXILIADORA DID NOT QUALIFY FOR THE 90% DISCOUNT FOR INTERNAL CONNECTIONS BASED ON INTERNAL CONNECTIONS

Maria Auxiliadora, in a timely manner, submitted to the SLD the information and documentation requested. Such information the school understood was enough to support the funding request for a 90% discount.

The SLD erred on denying the 90% discount to Maria Auxiliadora based on the decision granted for Internet Access, in which case Maria Auxiliadora proved to be eligible for a 90%, without asking for any additional information and or documentation to clarify any doubts or inconsistency.

V. CONCLUSION

Maria Auxiliadora for the reasons mentioned above states that, the SLD erred in their decision and we respectfully request the Commission to reverse the SLD’s decision of denying the discount percentage and grant its application to be funded at a 90% discount.

Respectfully submitted,

COLEGIO MARIA AUXILIADORA

/s/ 

Sor Margarita Fontán
Director, Colegio Maria Auxiliadora
Ave Eduardo Conde #2273
3ra Ext Villa Carolina
Santurce, PR 00915
Tel: 787-726-8288
Fax: 787-727-6497

June 15, 2005



Universal Service Administrative Company
Schools & Libraries Division

**E-RATE SELECTIVE REVIEW INFORMATION REQUEST
FUNDING YEAR 2004**

CASE # SR-2004-200291

To:	Madeline Melgen Ed D	From:	Jay Naik
Your Phone Number:	787-731-6100	My Phone Number:	973-884-8478
Your Fax Number:	787-731-0000	My Fax Number:	973-599-6515
Entity Name:	Colegio Maria Auxiliadora	My E-Mail Address:	jnaik@sl.universalservice.org
Today's Date:	08/12/2004	Total Pages:	16
PLEASE RESPOND BY:	08/30/2004		
Form 471 Application Number(s):	399296, 423955		

**PLEASE CALL TO CONFIRM THAT
THIS DOCUMENT HAS BEEN RECEIVED IN ITS ENTIRETY.**

Time Sensitive – 14-Day Response Expected

It is important that we receive all of the information requested within 14 calendar days of the date of this document so that we may complete our review of your funding request(s). Please do not hesitate to call me, should you have any questions. Thanks for your cooperation. If you need additional time to prepare your response, please let me know as soon as possible. If you are going to send me an e-mail, please make sure that at the end of your e-mail you have your Full Name and Official Title.

Who can respond to this request for information

This document requests information that must be provided by the applicant, or by the applicant's authorized representative. If the applicant is responding to this document, it must return the enclosed certification (Fax Back Page 4) to the Schools and Libraries Division (SLD) along with the requested material. If the applicant's authorized representative is responding to this document, the authorized representative must sign and return (1) the enclosed certification to SLD along with the requested material AND (2) a letter of agency or other agreement between the applicant and consultant authorizing them to act on the school or library's behalf.

How to respond

Please send your responses to the questions outlined on the following pages to:

Via Fax:	Via Expedited Mail:	Via email:
Jay Naik PIA Selective Review 973-599-6515	Jay Naik SLD 80 S. Jefferson Road Whippany, NJ 07981	jnaik@sl.universalservice.org

Thank you for your assistance as we work to assure the integrity of the Schools and Libraries Universal Service Support Mechanism. It is important that we receive all of the information requested within 14 calendar days. A checklist of the items requested in this document is

included on Fax Back Page 4.

If you have any questions with regard to this request or these worksheets, please contact the reviewer at the phone number or email address listed above.

Dear E-Rate Applicant:

In order to ensure that applicants are following certain FCC rules relating to certification statements and competitive bidding processes, you have been selected for a two-part review (Selective Review). We are seeking information about (1) your competitive bidding and vendor selection processes, and (2) information to support the certification you made on FCC Form 471, Item 25, that you have secured access to all of the necessary resources to make effective use of the requested products and services.

Both parts of the Selective Review take place at the billed entity level. An entity is considered a "billed entity" if it is responsible for making payments directly to a service provider. An entity that receives a bill, but does not make payments to the service provider on that bill, is not a billed entity. We will be requesting, and looking at information for ALL Form(s) 471 filed for the 2004-2005 funding year (Funding Year 2004) that were filed by the billed entity listed on the cover page of this document. Please notify us if you have additional Form(s) 471 for your billed entity number that we have not listed. The review will include those as well. It is important that you identify these additional applications at this time. Failure to do so may delay or jeopardize funding commitments and/or post-commitment disbursements. In addition, it may also result in future adjustments to any commitments that you may receive from us, or other action.

Part I: Information Regarding the Competitive Bidding Process and Vendor Selection

For each of the following items we have outlined the requested documentation you will need to supply. Please provide the information by funding request number (FRN) unless otherwise indicated. In the event that a document (e.g., contract, RFP, bid response, etc.) applies to multiple FRNs, simply indicate which FRNs the document supports on the first page of the document. If for any reason you do not have any of the documentation requested below, you **MUST** explain why.

Special Note Regarding State Master Contracts (SMC):

Remember that the filer of the Form 470 – whether state or applicant – must comply with all FCC requirements and local and state procurement laws, and that applicants must follow the applicable provisions of the State Master Contract and local and state procurement laws.

If you are procuring goods or services off a State Master Contract, and the state filed a Form 470 that lead to the award of that State Master Contract, you do not need to provide the competitive bidding and vendor selection documentation. If this is the case for some or all of your FRNs, please indicate such on your response. If, however, you filed one or more Forms 470 and then used the State Master Contract as a bid response, you must provide full documentation about your competitive bidding process and vendor selection.

Finally, note that that the State Master Contract in all of the following cases fulfills the FCC signed contract requirement, and it is not necessary for you to submit a copy of the State Master Contract with your response.

1) Requests for Proposal (RFP)

- a) Copies of any and all requests for proposals (RFPs), invitation to bid, request for bids, or other documentation of bid requests for services and/or products requested, or other solicitations in any way associated with the applicant's funding request(s) and/or the selection of the service provider(s) that appear(s) on the applicant's funding request(s). Be sure to include any and all amendments made to the original RFP.
- b) You do not need to provide copies of FCC Form(s) 470 that were posted to the SLD website.
- c) If RFPs, etc., are not provided, please explain why you have not provided them.

2) Bid Responses

- a) Complete copies of any and all proposals, bid responses, etc., received in response to the Form 470, and/or any RFP, or other solicitation in any way associated with the applicant's funding request and/or with the selection of the service provider that appears on the applicant's funding requests. Again, this information should be provided for all funding requests including tariff, month-to-month and contracted services.

3) Vendor Selection Process

- a) How many bids were received for each FRN Telecommunications, Internet Access and Internal Connections)?
- b) Complete documentation indicating how and why you selected your service provider(s). This documentation should include:
 - i) a description of your evaluation process,
 - ii) the factors you used to determine the winning bid, and
 - iii) attendance sheets for any meetings regarding the Form 470 and/or RFP or other solicitation vehicles.
- c) If more than one factor was used in the evaluation process to determine the winning bid(s) please indicate how those factors were weighted (points or percentage) in the evaluation process.

4) Contracts and/or other agreements

- a) Signed and dated copies of any and all agreements related to each of the Form 471 funding request(s), including any and all contracts, agreements, Statements of Work, etc., and any and all agreements between the applicant and the service provider related in any way to the applicant's funding request and/or provision of E-rate related services.
- b) If the price on the contract is different from the pre-discount price on your Form(s) 471, please explain the difference and account for the difference. (For example, if the dollar amount on the contract is higher than the dollar amount on your Form(s) 471, indicate which services have been removed, if that is the case. If the dollar amount on the contract is lower than the dollar amount on your Form(s) 471, explain why).
- c) If the contract referenced on a particular funding request is a state master contract, please indicate that. There is no need to provide us with the state master contract.
- d) If contracts, etc., are not provided, please explain why you have not provided them.

5) Consulting Agreements

- a) Please provide a complete copy of any consulting agreement(s) relating to the planning, implementation, and support of your E-rate funding request(s). If consulting agreement(s) were not used please indicate as such.

6) Correspondence (Email, phone logs, etc.)

- a) Please provide a copy of all correspondence between your entity and any service providers or consultants regarding the competitive bidding process and the application process.

If there is any other documentation that would be helpful to us in our review to ensure that you complied with the Commission's rules requiring a fair and open competitive bidding process, please provide that as well.

Part II: Information Regarding Your Item 25 Certification

Overview

To ensure that E-Rate funds are allocated appropriately, and in accordance with FCC Orders, each applicant is required to certify in Item 25 of the Form(s) 471 that: "The school(s) or library(ies) I represent have secured access to all the resources, including computers, training, software, maintenance, and electrical connections necessary to make effective use of the services purchased as well as to pay the discounted charges for eligible services." The Item 25 Certification review also looks at the applicant's ability to pay for its share of E-rate funding. In the course of the Item 25 Certification review we will ask for:

- documentation of your ability to pay for your share of E-Rate discounts and estimates of non-E-Rate eligible resources that you might use to meet this certification.
- your estimates of hardware, software, professional development, retrofitting, and maintenance investments that might not be E-Rate eligible, but are necessary to make effective use of the E-Rate discounts you have requested.
- a copy of the technology plan that supports your Funding Year 2004 (July 1, 2004 through June 30, 2005) funding requests.
- an estimate of the technology level of all schools or libraries within your organization following E-Rate.

If you identified additional application(s) not listed on the cover page of this document, you will also need to make an adjustment to the amounts we listed in the *Item 25 Worksheet Summary* Sections I-A and I-B. Please make the adjustment on the worksheet, initial it, and explain the adjustment when you return that worksheet.

Instructions for Completing the Item 25 Worksheet Summary: Fax Back Page 1

The *Item 25 Worksheet Summary: Fax Back Page 1* can be found on page 13 of this document. These instructions go with pages 12, 13, and 14 of this document. They are meant to help you complete and return those pages, and the necessary documentation noted below.

Special note to Consortium applicants: You have an option to provide us with the information requested below for the overall Consortium, or on a disaggregated basis with information pertaining to each individual entity listed on the Form(s) 471 Block 4 Worksheet C.

We understand that some consortia applicants do not collect the information requested in Sections I-VI below on a consortium basis. Therefore, you have the option of providing us with the requested information on a disaggregated basis. To do so, please make one copy of the *Item 25 Worksheet Summary: Fax Back Page 1* for each Block 4, Worksheet C entity (usually a school or library district). Be sure to complete the section at the very bottom of that page that identifies the entity. Note that in order to use this disaggregate method, you will also need to take the dollars that we have entered in to Section I-B and apportion them appropriately to each Block 4, Worksheet C entity.

Please also note that the FCC held in *Central Minnesota Computing Center (DA 01-776)* that consortium applicants must be able to provide information supporting the Item 25 certification for all of the members of their consortium, even if the resources are not under the direct control, or the responsibility, of the consortium leader.

Please contact the Selective Review team if you need further assistance in responding to this request on a disaggregated basis.

Section I: Connectivity

Subsection I-A. Commitment Amount Requested

We have looked at the Form(s) 471 that you filed for Funding Year 2004. We combined the commitment amounts that you requested on those Form(s) 471, by service category (the amount(s) from Form(s) 471, Block 5, Item 23k). We placed those sums next to the respective service category(ies) in Section IA, lines 1, 2, and 3 on the *Item 25 Worksheet Summary: Fax Back Page 1*. Please verify that these are the correct sums of the funding request amounts.

If your Funding Year 2004 Form(s) 471 contain duplication to account for Funding Year 2003 funding uncertainties and you do not see that duplication accounted for (i.e., the duplication removed) in the numbers in Sections I-A and I-B, please note that and provide an explanation.

As noted above, this part of the review is based on your ability to pay the non-discounted portion of the funding that you requested on your Form(s) 471. Therefore, unless and until certain FRNs are determined to be non-fundable (e.g., the funding cap prevents funding certain requests), we are asking to see that you have budgeted for all the requests that you listed on all Funding Year 2004 Form(s) 471 that you filed for your billed entity.

Also note that if you have identified Form(s) 471, in addition to those listed on the cover page of this document, please (1) make the necessary adjustments to Subsections I-A and I-B to accurately reflect all Form(s) 471 filed by your billed entity, (2) initial it, and (3) explain the adjustment when you return the worksheet.

Subsection I-B. Form 471 Applicant's Share

In Section I-B of the *Item 25 Worksheet* you are being asked to document the funds you have available to pay for the discounted charges on eligible services. These are funds for paying your share of telecommunications services, Internet access, or internal connections costs after the discount has been applied. The FCC intentionally requires applicants to pay for a portion of their services in order to encourage cost-effective practices. For further information on your obligation to pay this amount, please see "Obligation to Pay Non-Discount Portion" in the Reference Section of the SLD website at www.sl.universalservice.org. Remember that the funds to pay for your share of the E-rate cannot come directly or indirectly from your service provider.

We combined the "applicant share" of the amounts that you requested on Funding Year 2004 Form(s) 471, by service category. The applicant share is also known as the "non-discounted amount," that is, the amount that FCC rules require the applicant to pay. We placed those sums next to the respective service category(ies) in Section I-B line numbers 5, 6, and 7 on the *Item 25 Worksheet Summary: Fax Back Page 1*. Please verify that these are the correct sums of your share of the charges.

For Section I-B of the worksheet, please include the relevant pages of your approved 2004-2005 operating or facilities budget; that is to say, the pages that document your ability to pay your share of the purchased products/services, and the pages that document your revenue. This should include not only the budget line items that you will be referencing, but also a high level summary of your overall operating budget (e.g. total revenues and total expenses). To allow us to conduct our review, please be sure ALL of the following are included on the budget that you fax and/or send to us:

- The name of the entity to which the budget applies (Is it for a school? For a district? For one library outlet? For a library district? For a municipality?)
- The time frame that the budget covers, including a starting date and ending date (e.g., July 1, 2004-June 30, 2005)
- Both revenue and expense line items
- Place an arrow next to each fund/budget line, on BOTH the revenue and expense side of your budget, showing where you have allocated the necessary dollars for your share of E-rate. Please write the specific amount that will come from each fund/budget line. For example, if budget line A0002 contains \$200,000 and \$100,000 will be used to pay your share of E-rate, then please draw an arrow to it and write "E-rate, \$100,000".

Please explain any discrepancies between the Form 471 Applicant Share (Section I-B of the *Item 25 Worksheet Summary: Fax Back Page 1*) and the dollars you identified on the budget that you provide. Failure to do so could delay or jeopardize the processing of your funding.

Also in this section, please provide an explanation of how any budget deficits, state-funding cuts, fund-raising effort shortfalls or other uncertainties will be addressed. Particularly we are looking for assurances that such cuts or shortcomings will NOT result in cutting the financial resources that are budgeted for your applicant share. If they will, we seek assurances, which we may later verify, that an FCC Form 500 would be filed to reduce the funding requests accordingly.

Note: If you provide a final approved budget, we may verify that budget with independent sources.

Alternatives to an approved budget:

If a final, approved budget is not available or is still in the approval process, we will accept certain alternative documentation as delineated below. A letter signed by a school or library official (e.g., superintendent, board president, chief business officer) must accompany the document(s).

The letter should explain (1) what phase of the approval process you are in, (2) whether your share of funding is contingent on any outside action (e.g., voter approval, board approval, state legislation, etc.) and (3) whether in the absence of such outside approval, you anticipate being able to meet your share. Please make sure that the letter identifies the specific amount that you will have available to pay your share. For example, if you have \$100,000 allocated in your budget, make sure that is noted in the letter.

In addition to the letter, we require one of the following items:

- A draft budget for 2004-2005 to include ALL of the following:
 - The name of the entity to which the budget applies (Is it for a school? For a district? For one library outlet? For a library district? For a municipality?)
 - The time frame that the budget covers, including a starting date and ending date (e.g., July 1, 2004-June 30, 2005)
 - Both revenues and expense line items.
 - Place an arrow next to each fund/budget line, on BOTH the revenue and expense side, showing where you have allocated the necessary dollars for your share of E-rate. Please write the specific amount that will come from each fund/budget line. For example, if budget line A0002 contains \$200,000 and \$100,000 will be used to pay your share of E-rate, then please draw an arrow to it and write "E-rate, \$100,000".
- A resolution of a governing Board authorizing the filing of the Form(s) 471 for a given dollar amount, for given services and/or products, and within a given timeframe. For us to consider such a resolution sufficient evidence that your entity has provided for payment of your share of E-rate, the resolution should specify the funding year, the fiscal year, or the school year during which the payment is authorized.
- A signed commitment letter to the applicant from the donor (e.g. school or library foundation), if donations (or other dollars from any contributor) are a source of funding. The letter MUST specify (1) the level and commitment of funds or other resources; (2) the timing of the delivery of such resources, along with a dispositive indication that the resources are for E-rate supported products/services or for items needed to effectively use the discounted services. (The indication as to the use of the resources might come from the donor or be reflected in a Board resolution committing donations to E-rate related purposes.) While your service provider may assist you in locating bona-fide grants, the grants or outside funding organizations must be independent of the service provider.

Subsection I-C. Amounts not covered by E-rate

In Section I-C of the *Item 25 Worksheet* you are asked to indicate the total amount of money that you will pay during Funding Year 2004 for E-Rate eligible products/services for which you are NOT requesting E-Rate funding.

- Separate the services/products into their respective service categories (telecommunications, Internet access and internal connections) and total the results of each category.
- Enter these amounts in the *Item 25 Worksheet Summary*, Section I-C in the respective service category (Numbers 9, 10, 11).
- Sum items I-C, 9 through 11 and enter this amount in #12.

Sections II through VI: Hardware, Professional Development, Software, Retrofitting and Maintenance

For Sections II through VI of the worksheet, you will be asked for investment amounts in these areas for the prior Funding Year 2003 (2003-2004) and also for the investment that coincides with Funding Year 2004 (2004-2005). It is not initially necessary to document your estimates. However, in the event of a future audit, or depending on the results of our analysis, you may be asked to provide additional documentation to clarify or substantiate your estimates.

For Sections II through VI (Hardware, Software, Professional Development, Retrofitting, and Maintenance), Securing access to necessary resources for non-eligible products and services does not mean that all resources to support the purchased services must be paid for out of current year funds. Therefore, if you can demonstrate that the computers are in place, the training has occurred, or the electrical system has been upgraded as a result of investments in previous years, then those resources are available to support the purchased services. You may attach a page to the worksheet, or cross-reference the technology plan you have provided, to document that these resources are available. You may also estimate the value of donations and in-kind contributions on the worksheet, and include these values in the subtotals for each section. These can be listed on the line marked "Contributions/In Kind" for each section.

If you have submitted your E-Rate request on behalf of a school system, a library system, or a consortium, your response on these worksheets should represent the total of all of the resources available in all of the eligible entities covered by your request. For example, you would include your estimate of all of the networked computers in your school district or library system buildings that will be covered by your funding request. If, as an applicant, you have submitted multiple Form(s) 471, a single worksheet should be used to summarize the total requests for all of your Form(s) 471, and the total resources that are available to support those requests. The exception to using a single worksheet is if you are a Consortium applicant and you decide to use the disaggregate method for demonstrating compliance with your Item 25 Certification. (See the description in the box on page 4.)

Section II: Hardware

Hardware includes computers, printers, fax machines, video equipment, scanners, CD-ROM drives, servers, etc., that are used to support and improve education or library service.

To use telecommunications access effectively for improved education or library service you should have computers that can take advantage of the resources available on the Internet.

Legacy equipment (PCs below 486 or Macs below 040 processors) that cannot take full advantage of the Internet should not be included in the hardware available to support purchased services unless they can support text-based browsing (such as Macs with 020 processors or 386 PCs with appropriate software).

- In Section II-A, number 13a, please enter the number of computers connected to the Internet as of today. In number 13b, enter the number of computers scheduled to be connected as of June 30, 2005.
- In Section II-B, number 14a, please enter the number of servers connected to your network as of today. In number 14b, enter the number of servers scheduled to be connected to your network as June 30, 2005.
- In Section II-C, number 15a, please enter the number of data and voice drops that are currently installed as of today. In number 15b, enter the number of data and voice drops that are scheduled to be installed as of June 30, 2005.
- In Section II-D, please estimate your total expenditures for hardware during Funding Year 2003 and Funding Year 2004. Enter these numbers in Section II-D, Numbers 16a and 16b.
- Estimate the value of in-kind hardware donations received last Funding Year 2003 and expected donations in Funding Year 2004. Enter these numbers in Section II-E, numbers 17a and 17b.
- Add 16a and 17a. Enter the sum in 18a.
- Add 16b and 17b. Enter the sum in 18b.

If you have made a significant investment in technology prior to Funding Year 2003, please summarize the resources that are already in place in the section titled, *Resource Plan: Fax Back Page 2*. Please also describe any other resources to support this area that are not represented on the *Item 25 Worksheet*, but of which we should be aware. If you have applied for matching funds or grants from other sources that have not yet been approved, please note that as well.

Section III: Professional Development

Professional Development, which is not eligible for E-rate discounts, is necessary to ensure that you are prepared to make effective use of purchased services. Professional development should provide for ongoing and sustained training for not just the technical staff, but teachers or librarians as well.

Your budget should provide for professional development that goes beyond the acquisition of generic computer skills to include mastery of technology applications specifically designed to improve teaching, learning or library service. Training that is limited to the acquisition of basic computer skills is not sufficient. Training should be coordinated with the availability of appropriate technology in the school, classroom, or library.

The following are possible professional development costs that might have been incurred by your organization: seminars and conferences; faculty hired to conduct in-service or on-site training; technology related courses attended by your staff and paid for by your organization; books and other instructional materials; and full time professional development staff. Peer tutoring and peer monitoring is another method for delivering training, and you may include this in your estimate of Professional Development Contributions and in-kind donations. However, for these purposes, please do not include any non-technology course costs.

- Estimate the percent of your instructional or library service staff that have been trained to use technology to improve education or library services and list the results in Section III-A Staff Training Hours (the combined total should equal 100%). Please note that here we are looking for the CURRENT percentages of teacher or librarian training.

- Estimate the value of your professional development expenditures for Funding Year 2003 and Funding Year 2004. Enter these numbers in 20a and 20b.
- Estimate any in-kind or pro-bono professional development received in Funding Year 2003 and any anticipated during Funding Year 2004. Enter these numbers in 21a and 21b.
- Add 20a and 21a. Place the sum in 22a.
- Add 20b and 21b. Place the sum in 22b.

If you have made a significant investment in professional development prior to Funding Year 2003 please summarize these resources in the section titled, *Resource Plan: Fax Back Page 2*. Please also describe any other resources to support this area that are not represented on the *Item 25 Worksheet*, but of which we should be aware. If you have applied for matching funds or grants from other sources that have not been approved yet, please note that as well.

Section IV: Software

Some software (such as productivity tools, curriculum software, library content, etc.) is not eligible for discounts, but is necessary to make effective use of the purchased services. (Software to operate a network server is eligible and would be included in Connectivity above).

- Estimate the value of your software expenditures for Funding Year 2003 and Funding Year 2004. Enter these numbers in 23a and 23b.
- Estimate any in-kind contributions of software products received during Funding Year 2003 and any anticipated contributions during Funding Year 2004. Enter these numbers in 24a and 24b.
- Add 23a and 24a. Place the sum in 25a.
- Add 23b and 24b. Place the sum in 25b.

If you have made a significant investment in software prior to Funding Year 2003, please summarize these resources that are already in place in the section titled, *Resource Plan: Fax Back Page 2*. Please also describe any other resources to support this area that are not represented on the *Item 25 Worksheet*, but of which we should be aware. If you have applied for matching funds or grants from other sources that have not been approved yet, please note that as well.

Section V: Retrofitting

Retrofitting that may be necessary to make effective use of purchased services is not eligible for E-rate discounts, but it is necessary to make effective use of the purchased services. **Retrofitting includes electrical wiring, asbestos removal, building modifications, renovations and repairs necessary to use the requested E-rate products and services.** Retrofitting is not the costs that you incurred to upgrade your computer wiring or network hardware.

- Estimate your retrofitting investment during Funding Year 2003 and your anticipated investment for Funding Year 2004. Enter these numbers in 26a and 26b.
- Estimate any in-kind or pro-bono work in the area of retrofitting received during Funding Year 2003 or any anticipated during Funding Year 2004. Enter these numbers in 27a and 27b.
- Add 26a and 27a. Place the sum in 28a.

- Add 26b and 27b. Place the sum in 28b.

If you have made a significant investment in retrofitting prior to Funding Year 2003, please summarize these resources that are already in place in the section titled, *Resource Plan: Fax Back Page 2*. Please also describe any other resources to support this area that are not represented on the *Item 25 Worksheet*, but of which we should be aware. If you have applied for matching funds or grants from other sources that have not been approved yet, please note that as well.

Section VI: Maintenance

Systems maintenance and operations costs for ineligible hardware and software, and salaries of staff are ineligible for E-rate discounts. Nevertheless, they are necessary to make effective use of the purchased services (maintenance costs for E-rate eligible equipment and services; that do not include applicant staff salaries, should be included in Connectivity above).

- Estimate your expenditures for systems maintenance and operations in Funding Year 2003 and your anticipated expenditures in Funding Year 2004. Place these numbers in 29a and 29b.
- Estimate any pro-bono maintenance or the value of donated time for maintenance during Funding Year 2003 and any anticipated during Funding Year 2004. Place these numbers in 30a and 30b.
- Add 29a and 30a. Place the sum in 31a.
- Add 29b and 30b. Place the sum in 31b.

If you have made a significant investment in maintenance and operations prior to Funding Year 2003, please summarize these resources that are already in place in the section titled, *Resource Plan: Fax Back Page 2*. Please also describe any other resources to support this area that are not represented on the *Item 25 Worksheet*, but of which we should be aware. If you have applied for matching funds or grants from other sources that have not been approved yet, please note that as well.

Technology Plan

Please include a copy of your technology plan that supports your funding requests made in Funding Year 2004. Your technology plan helps us better understand the resources that are available to support the funding requests that you have submitted on your Form(s) 471.

Technology Implementation Level Worksheet

- In column A, list the number of schools or libraries that currently fall into the technology levels described below.
- In column B, indicate where you anticipate your schools/libraries to be as a result of the technology requests you made on your Funding Year 2004 Form(s) 471.

If you are responding on behalf of a consortium, a school district or a library system that has schools or libraries (outlets/branches) at different levels, please list the number of sites that are at each level.

		(A)	(B)
Please list the <i>number</i> of schools and libraries that are currently and <i>will be</i> at each level <i>after</i> the requested services are installed.		Current Number of Schools/Libraries	After 2004-2005 E-rate products/services are installed number of Schools/Libraries
Level 1	Phone Service, and Single Point Internet Access		
		Enter the above number in "Level 1 current:" on the bottom of Fax Back Page 1.	Enter the above number in "Level 1 by 6/30/05:" on the bottom of Fax Back Page 1.
Level 2	Phone Service, and multiple computers connected directly to the Internet in a networked lab or single location in a library.		
		Enter the above number in "Level 2 current:" on the bottom of Fax Back Page 1.	Enter the above number in "Level 2 by 6/30/05:" on the bottom of Fax Back Page 1.
Level 3	Phone Service, and direct Internet connection on building LAN with some classrooms networked or distributed centers in a library.		
		Enter the above number in "Level 3 current:" on the bottom of Fax Back Page 1.	Enter the above number in "Level 3 by 6/30/05:" on the bottom of Fax Back Page 1.
Level 4	Phone Service, and direct Internet connection on building LAN with access from all classrooms or library centers.		
		Enter the above number in "Level 4 current:" on the bottom of Fax Back Page 1.	Enter the above number in "Level 4 by 6/30/05:" on the bottom of Fax Back Page 1.

ITEM 25 WORKSHEET SUMMARY: FAX BACK PAGE 1

Item 25 Worksheet Summary	Funding Year 2003	Funding Year 2004
Please Add Subtotals of Sections I through VI	(07/01/03-06/30/04)	(07/01/04-06/30/05)

Section I: Connectivity

I-A. Commitment Amount Requested

• Telecom	1	\$2,160.00
• Internet Access	2	\$16,790.40
• Internal Connections	3	\$10,242.00
Total of Funding Requests (I-A)	4	\$29,192.40

I-B. Form 471 Applicant's Share

• Telecom	5	\$240.00
• Internet Access	6	\$1,865.60
• Internal Connections	7	\$1,138.00
Total of Applicant Share (I-B)	8	\$3,243.60

I-C. Amounts not covered by E-Rate

• Telecom	9	\$
• Internet Access	10	\$
• Internal Connections	11	\$
Total of Amounts Not Covered (I-C)	12	\$

Total Connectivity (I-A + I-B + I-C) \$ \$

Section II: Hardware

II-A. Number of Computers Connected	13a. #	27	13b. #	—
II-B. Number of Servers Connected	14a. #	1	14b. #	1
II-C. Number of Data/Voice Drops Installed	15a. #	30	15b. #	80
II-D. Applicant Expenditure	16a. \$	5,095.00	16b. \$	7,000.00
II-E. Contribution / In-Kind Donations	17a. \$	5,345.62	17b. \$	11,432.46
Total Hardware (II-D + II-E)	18a. \$	10,440.62	18b. \$	18,432.46

Section III: Professional Development

III-A. Staff Training Hours (Total 100%):

0-5 Hrs. ___% 5-15 Hrs. 19% 15-25 Hrs. 21% 25-50 Hrs. ___% 50+ Hrs. ___%

III-B. Applicant Expenditure	20a. \$	2,500.00	20b. \$	3,000.00
III-C. Contribution / In-Kind Donations	21a. \$	—	21b. \$	—
Total Professional Development (III-B + III-C)	22a. \$	2,500.00	22b. \$	3,000.00

Section IV: Software

IV-A. Applicant Expenditure	23a. \$	2,000.00	23b. \$	6,000.00
IV-B. Contribution / In-Kind Donations	24a. \$	—	24b. \$	21,143.66
Total Software (IV-A + IV-B)	25a. \$	2,000.00	25b. \$	27,143.66

Section V: Retrofitting

V-A. Applicant Expenditure	26a. \$	14,000.00	26b. \$	115,000.00
V-B. Contribution / In-Kind Donations	27a. \$	—	27b. \$	—
Total Retrofitting (V-A + V-B)	28a. \$	14,000.00	28b. \$	115,000.00

Section VI: Maintenance

VI-A. Applicant Expenditure	29a. \$	16,000.00	29b. \$	16,200.00
VI-B. Contribution / In-Kind Donations	30a. \$	—	30b. \$	—
Total Maintenance (VI-A + VI-B)	31a. \$	16,000.00	31b. \$	16,200.00

Total of E-Rate Initiative (Total of Section I to VI) 32a. \$ 32b. \$

Technology Implementation Level (Enter Number of schools/libraries at each level from worksheet)

Level 1 current:	Level 2 current:	Level 3 current: X	Level 4 current:
Level 1 by 6/30/05:	Level 2 by 6/30/05:	Level 3 by 6/30/05: X	Level 4 by 6/30/05:

For Consortium applicants choosing to provide a response on a disaggregated basis:

Block 4 Entity Name: _____ Entity Number: _____

Item 25 Worksheet Summary page: _____ of _____

Resource Plans and Investments: On this worksheet you are asked to estimate any relevant investments in the resources you need to make effective use of requested E-rate services that happened prior to Funding Year 2003 covered on the *Item 25 Worksheet Summary: Fax Back Page 1* as well as any other resources that are available to you but which are not represented on the *Item 25 Worksheet*. Please use this space, or attach an additional page, to provide narrative information about both your plans and strategies for securing the necessary resources to make effective use of the requested services and previous years' investments in technology. You may use the space below to cross reference sections of your approved technology plan, your budget, or other relevant documentation. If you have made a significant investment in technology prior to Funding Year 2003, please summarize these resources that are already in place. If you have applied for matching funds or grants from other sources that have not been approved yet, please note it. Include all information about resources that you have available to make effective use of E-rate funding.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE 3

E-rate Implementation: On this worksheet please describe your overall strategy for implementing your E-rate requests this year, noting especially any differences if not all of your facilities are at the same technology implementation level. Please give us an overall picture of what you are trying to accomplish so that we can better understand how the requested services will work in conjunction with the resources that you have identified throughout this document.

[illegible]

E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE 4

Selective Review Information Request Completion Certification

If the applicant's authorized representative completed the information in this document, please attach a copy of the letter of agency or other agreement between the applicant and consultant authorizing them to act on the school or library's behalf. For the purposes of this form, in the Employer's Name field, a consultant should enter the name of his or her consulting firm.

Name		Title	
Email Address		Telephone Office	Fax
Employer's Name			
Employer's Street Address		State	Zip Code
Billed Entity Name Colegio Maria Auxiliadora			
Billed Entity Number 200291			
Funding Year 2004 Forms 471 Application Numbers 399296, 423955			
<ul style="list-style-type: none">• I certify that I prepared the responses in this document on behalf of the above named entity.• I certify that despite any budget deficits, fund-raising effort shortfalls, or other uncertainties that the funding source(s) identified for my applicant share of E-rate will not be affected.			
Authorized Signer's Signature		Date	
Authorized School or Library Official's Signature		Date	

Selective Review Information Request Checklist:

Remember to include all of the following in your response:

- ✓ Copies of signed and dated contracts relating to the Form(s) 471 for all contracted services, except those contracts that are state master contracts.
- ✓ Copies of all requests for proposals, etc., where a vehicle other than the Form 470 was used for procurement.
- ✓ Copies of all bids that were received for all funding requests.
- ✓ Complete documentation regarding the process used for selecting your service provider(s).
- ✓ Copies of any consulting agreements.
- ✓ Correspondence between the consultant/service provider and the school/library regarding the competitive bidding process and the application process.
- ✓ Copy of your technology plan that supports your funding request for Funding Year 2004.
- ✓ Fax Back Pages 1-4.
- ✓ Approved operating budget which includes both revenues and expenses or alternative budget documentation.
- ✓ Letter of agency or agreement if responder is authorized representative of the eligible entity, if required.

**SUPERINTENDENCIA DE E
CATOLICAS
PROGRAMA E-RATE
FAX (787) 272-0771**

FACSIMILE TRANSMITTAL SHEET

TO	FROM
Jay Naik	Marieglorie Zapata
COMPANY	DATE
PLA Selective Review	10/22/2004
FAX NUMBER	TOTAL NO. OF PAGES INCLUDING COVER
1-973-599-6515	14
PHONE NUMBER	SENDER'S REFERENCE NUMBER
RI	YOUR REFERENCE NUMBER
COLEGIO MARIA AUXILIADORA	

☒ URGENT ☐ FOR REVIEW ☐ PLEASE COMMENT ☐ PLEASE REPLY ☐ PLEASE RECYCLE

NOTES/COMMENTS:

Enclosed are requested documents.

Marieglorie Zapata
E-Rate Administrative Assistant
e-mail: mzapata@escuelascatolicas-sj.org

Colegio María Auxiliadora
Ave. Eduardo Conde #2273, San Juan, P.R. 00915-4319
Tel. 726-8288 Fax- 727-6497



October 8, 2004

TO: **Jay Naik**
PIA Selective Review
Universal Service Administrative Company
School & Libraries Division
Fax 973-599-6515

Response to E-Rate Selective Review Information Request Form 471 Applications#
399296, 423955 year 7 (2004-2005).

Information Regarding the Competitive Bidding Process and Vendor Selection:

1. The E-Rate funding procurement process for the **Colegio María Auxiliadora** was conducted by the Consorcio de Colegios Católicos Arquidiócesis de San Juan on behalf of the participating schools, as established in the Consortium's participation agreement. Also, the CCCASJ signed an E-Rate Services Agreement. The school submitted a signed the F-471 as a supplement of the agreement. Copy of the agreement is included in Annex 1.
2. The school as a participant entity of the CCCASJ was part of the procurement process. After publishing the F-470, the vendors that contacted either CCCASJ or the school were invited to evaluate the Technology Plan implementation to gather the information they understood was necessary to confirm their proposals. Copy of the Technology Plan is included in Annex 2. (Will be sent by Fedex)
3. The bids were received by the CCCASJ by Madeline Melgen, Ed.D.
4. The service provider selection was recommended by the Consortium's (CCCASJ) technology committee as part of the advisory services to the consortium's participants. The CCCASJ received the service provider proposals, conducted the evaluation process and recommended a Service Provider to the participants.
5. Copy of the school representation agreement by the CCCASJ is included in Annex 3.
6. Included is the agenda of the meeting for the vendor selection notification for Internal Connections and Dedicated Services of year 7 (2004-2005) for the E-Rate Program. At this meeting the CCCASJ explained the evaluation and selection process to the participants. The written communication between the CCCASJ and the entities that are members of the Consortium is included in Annex 4.

Jay Naik
Page 2

Information Regarding Item 25 Certification

1. Item 25 Worksheet Summary is includes
2. School budget 2004-2005 is included Annex 6

Cordially,


Sor Margarita Fontán, FMA
Director

Annex 1

Service Agreement

Will be send by Fedex
to your attention.

Annex 2

Technology Plan

Was sent by Fedex to
your attention.

C.C.C.A.S.J.



Consorcio Colegios Católicos Arquidiócesis de San Juan

Edificio 2021 Carr. 177 Guaynabo, Puerto Rico 00969-5140

Teléfono (787) 731-6100 Fax (787) 731-0000

Acuerdo de Representación

Este es un acuerdo de representación donde **Colegio María Auxiliadora** solicita al Consorcio de Colegios Católicos de la Arquidiócesis de San Juan (Consorcio) representación y apoyo en los procesos relacionados a la solicitud y utilización de fondos del programa E-Rate que administra el School & Libraries Division (SLD), para el Año 7 (07/01/04 a 06/30/05). Este acuerdo define los términos bajo los cuales el Consorcio ofrecerá dicha representación y asesoramiento. Bajo este acuerdo **Colegio María Auxiliadora** y el Consorcio se comprometen a cumplir con las responsabilidades que a cada uno le corresponden según lo establece el SLD y cualquier otro compromiso o responsabilidad que ambos acuerden deben establecer.

Consorcio:

- ✓ Asesorará a **Colegio María Auxiliadora** en el desarrollo de su Plan de Tecnología que cumpla con los requisitos de SLD (Schools & Libraries Division).
- ✓ El Consorcio en representación de **Colegio María Auxiliadora** publicará la Forma 470 y atenderá los procesos de establecer los requisitos de licitación, recibir y evaluar propuestas de los suplidores.
- ✓ El Consorcio dirigirá los esfuerzos para proveer información al SLD relacionada con los procesos de solicitud y utilización de los fondos E-Rate.
- ✓ El Consorcio se compromete a cumplir con las funciones que le asigna SLD a los consorcios representantes de entidades solicitantes. (Apéndice II)

Colegio/Academia

- ✓ Proporcionará al Consorcio de información necesaria para cumplimentar la solicitud de propuestas, Forma 470.
- ✓ Se compromete a proveer al Consorcio a los suplidores la información que estos solicitan para el proceso de completar sus propuestas.
- ✓ Se compromete a participar en el proceso de someter la Forma 471 y documentos relacionados, respondiendo a las solicitudes de información y firma de acuerdos en las fichas estipuladas.
- ✓ Se compromete a cumplir con los requisitos que establece SLD a las entidades solicitantes (Tabla de cotejo - Apéndice I)

Otros términos y condiciones pueden ser añadidos a este acuerdo, previa aprobación de ambas partes.

Nombre: **Sor Maritza Ortiz**

Nombre: **Madeline Melgen, Ed.D.**

Firma: *Sor Maritza Ortiz*

Firma: *Madeline Melgen, Ed.D.*

Posición: **Principal**

Posición: **Directora del Consorcio**

Fecha: 5 de noviembre de 2003

Fecha: 5 de noviembre de 2003

"Sirviendo a los Colegios Católicos de San Juan"

Annex 4

Bidding Process

Will be send by Fedex
to your attention.

School Name: Colegio María Auxiliadora - Santurce

ITEM 25 WORKSHEET SUMMARY: FAX BACK PAGE 1

Item 25 Worksheet Summary		Funding Year 6 (2003-2004)	Funding Year 7 (2004-2005)
Please add Subtotals of Sections I through VI			
Section I: Connectivity			
I-A. Commitment Amount Requested			
Telecom	1	\$2,160.00	
Internet Access	2	\$16,790.40	
Internal Connections	3	\$10,242.00	
Total of Funding Requests (I-A)	4	\$29,192.40	
I-B. Form 471 Applicant's Share			
Telecom	5	\$240.00	
Internet Access	6	\$1,865.60	
Internal Connections	7	\$1,138.00	
Total of Applicant Share (I-B)	8	\$3,243.60	
I-C. Amounts not covered by USF Program			
Telecom	9	\$0.00	
Internet Access	10	\$0.00	
Internal Connections	11	\$0.00	
Total of Amounts Not Covered (I-C)	12	\$0.00	
Total Connectivity (I-A + I-B + I-C)		\$32,436.00	
Section II: Hardware			
II-A. Number of Computers Connected	13a. #	28	13b. # 40
II-B. Number of Servers Connected	14a. #	1	14b. # 1
II-C. Number of Data/Voice Drops Installed	15a. #	30	15b. # 80
II-D. Applicant Expenditure	16a. \$	\$5,095.00	16b. \$ 7,700.00
II-E. Contribution / In-Kind Donations	17a. \$	\$5,345.62	17b. \$ 11,432.46
Total Hardware (II-D + II-E)	18a. \$	\$10,440.62	18b. \$ 19,132.46
Section III: Professional Development			
III-A. Staff Training Hours (Total 100%):			
0-5 Hrs. ____% 5-15 Hrs. <u>79%</u> 15-25 Hrs. <u>21%</u> 25-50 Hrs. ____% 50 + Hrs. ____%			
III-B. Applicant Expenditure	20a. \$	\$2,500.00	20b. \$ 3,000.00
III-C. Contribution / In Kind Donations	21a. \$	\$0.00	21b. \$ 0.00
Total Professional Development (III-B + III-C)	22a. \$	\$2,500.00	22b. \$ 3,000.00
Section IV: Software			
IV-A. Applicant Expenditure	23a. \$	\$2,000.00	23b. \$ 6,000.00
IV-B Contribution / In Kind Donations	24a. \$	\$0.00	24b. \$ 21,143.66
Total Software (IV-A + IV-B)	25a. \$	\$2,000.00	25b. \$ 27,143.66
Section V: Retrofitting			
V-A. Applicant Expenditure	26a. \$	\$14,000.00	26b. \$ 115,000.00
V-B Contribution / In Kind Donations	27a. \$	\$11,306.17	27b. \$ 0.00
Total Retrofitting (V-A + V-B)	28a. \$	\$25,306.17	28b. \$ 115,000.00
Section VI: Maintenance			
VI-A. Applicant Expenditure	29a. \$	\$16,090.00	29b. \$ 16,200.00
VI-B Contribution / In Kind Donations	30a. \$	\$0.00	30b. \$ 0.00
Total Maintenance (VI-A + VI-B)	31a. \$	\$16,090.00	31b. \$ 16,200.00
Total of E-Rate Initiative (Total of Section I to VI)	32a. \$	\$56,336.79	32b. \$ 212,912.12
Technology Implementation Level (Enter Number of schools/libraries at each level from worksheet)			
Level 1 current:	Level 2 current :	Level 3 current: X	Level 4 current:
Level 1 by 6/30/05:	Level 2 by 6/30/05:	Level 3 by 6/30/05: X	Level 4 by 6/30/05:

RESOURCE PLAN: FAX BACK PAGE 2

Resource Plans and Investments: On this worksheet you are asked to estimate any relevant investments in the resources you need to make effective use of requested E-rate services that happened prior to Funding Year 2003 covered on the *Item 25 Worksheet Summary: Fax Back Page 1* as well as any other resources that are available to you but which are not represented on the *Item 25 Worksheet*. Please use this space, or attach an additional page, to provide narrative information about both your plans and strategies for securing the necessary resources to make effective use of the requested services and previous years' investments in technology. You may use the space below to cross reference sections of your approved technology plan, your budget, or other relevant documentation. If you have made a significant investment in technology prior to Funding Year 2003, please summarize these resources that are already in place. If you have applied for matching funds or grants from other sources that have not been approved yet, please note it. Include all information about resources that you have available to make effective use of E-rate funding.

Las inversiones realizadas en la planta física previas al año 2003 fueron:

-Pintura Exterior del edificio; costo \$25,000.00

-Aires acondicionados para K-2;

-Aires acondicionados para salón computadoras y screens plásticos;

Las inversiones en Tecnología previas al año 2003 fueron:

-Computadoras para Lab.

-Suelo maestro de computadora

-Computadora oficina administración;

Dichas inversiones tenían el propósito de ofrecer mantenimiento adecuado para la planta física. Los aires acondicionados proveen un ambiente más cómodo para que los alumnos estudien y ayudan a mantener los equipos en una temperatura adecuada propiciando su funcionalidad. La adquisición de equipo hace más pertinente el proceso de enseñanza y aprendizaje y facilita la comunicación al estudiante y a la escuela con el mundo exterior (red virtual), enriqueciendo y ampliando el entorno educativo.

Después del año 2003 se han adquirido otros equipos y programas, unos con fondos propios o de los padres, otros a través del Consorcio de Escuelas Católicas, como está indicado en el Informe de Revisión. Actualmente está en funciones unas 23 computadoras con acceso a Internet (E-Rate) en el salón de computadoras y otras en la Biblioteca y Administración.

Esto nos permite el acceso de todo el alumnado al mundo de la tecnología y Internet. También se benefician los profesores que pueden expandir sus áreas curriculares y hacer la enseñanza más significativa y cercana al alumno.

(continúa en siguiente página...)

RESOURCES PLAN: FAX BACK CONTINUATION PAGE 2

Después del año 2005 esperamos que nuestra planta física tenga la capacidad para unos 525 estudiantes ya que probablemente se duplicará también el tercer grado. Estamos pendientes de unas facilidades adyacentes al Colegio actual, las cuales se utilizarían para trasladar los grados Kinder y Primero hacia un área más adecuada y con mayor amplitud tanto en los salones como en el patio.

El costo de dicha inversión es de alrededor de \$100,000.00 que serán provenientes de ofertas privadas y actividades con los padres del Colegio tales como ventas, rifas y otras.

En cuanto a las inversiones en tecnología, esperamos adquirir programados para el área de Inglés de los grados Kinder-Sexto, así como dar mantenimiento a las computadoras que ya estamos utilizando (23).

La inversión en esta área son unos \$6,000.00 aproximadamente de los fondos del Colegio. Posiblemente se adquirirán unas cinco (5) computadoras adicionales, cuyos fondos serán de Propuestas en el Consorcio Sup. Escuelas Católicas (federales) y/o de ofertas privadas. Estas son necesarias porque nuestros grupos son de 25 estudiantes o más para poder garantizar una computadora por estudiante en el tiempo que sean utilizadas con sus maestros.

E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE 3

E-rate Implementation: On this worksheet please describe your overall strategy for implementing your E-rate requests this year, noting especially any differences if not all of your facilities are at the same technology implementation level. Please give us an overall picture of what you are trying to accomplish so that we can better understand how the requested services will work in conjunction with the resources that you have identified throughout this document.

Nuestra escuela incorpora la tecnología a las actividades curriculares mediante el uso de los equipos ya existentes en la biblioteca, en el Salón de Computadoras y en algunos salones regulares. El recurso de la Internet, disponible tanto en la biblioteca como en el Lab. de Computadoras, se integra en actividades individuales y grupales donde el maestro regular se comunica con el maestro bibliotecario y la de Computadoras para dar seguimiento a las lecciones asignadas. El estudiante aprende a manejar la computadora, el Internet y otros programas mientras realiza una actividad de redacción o investigación en su materia particular (Ciencias, matemáticas u otras). También el maestro, a nivel individual, tiene acceso a las áreas de computadora para preparar sus clases y ofrecerlas en el salón biblioteca o laboratorio, si así lo desea.

Todos los grupos de Kinder a 12mo tienen acceso al salón de computadoras una o dos horas por semana. Actualmente contamos con una matrícula de 495 estudiantes (2004-05). En los salones de Kinder a 2do existe al menos una computadora para uso del maestros en sus lecciones. Falta el acceso a Internet más el lograr, como mínimo, una computadora con Internet para cada salón, así como programados para las diversas materias. En Administración hay una computadora con acceso a Internet. Hay otras 2 comutadoras que lo tienen.

Deseamos también una conexión de Internet o cable para el Salón General de Actividades donde suelen realizarse las reuniones de los padres. En el salón de Audiovisual y en la Biblioteca y en el Labo. de Computadoras nos gustaría tener un proyector de transición entre la computadora y el TV o la pantalla y tal vez las llamadas pizarras electrónicas.

En un mundo dominado por la tecnología, nos gustaría que nuestros estudiantes sean constructores de paz, aprendiendo a utilizarla adecuadamente para la meta de un ambiente más humano, justo y solidario.

E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE 4

Selective Review Information Request Completion Certification

If the applicant's authorized representative completed the information in this document, please attach a copy of the letter of agency or other agreement between the applicant and consultant authorizing them to act on the school or library's behalf. For the purposes of this form, in the Employer's Name field, a consultant should enter the name of his or her consulting firm.

SECTION 1: AUTHORIZED SIGNER INFORMATION			
Name Sor Margarita Fontán		Title Director	
E-mail Address		Telephone Office 787-726-8288 Fax 787-727-6497	
Employer's Name Colegio María Auxiliadora			
Employer's Street Address Ave. Eduardo Conde #2273, Santurce		State PR	Zip Code 00915
SECTION 2: APPLICANT INFORMATION			
Billed Entity Name Colegio María Auxiliadora		Billed Entity Number 200291	
Funding Year 2004 Forms 471 Application Numbers: 399296, 423955			
SECTION 3: CERTIFICATION STATEMENT			
* I certify that I prepared the responses in this document on behalf of the above named entity.			
* I certify that despite any budget deficits, fund-raising effort shortfalls, or other uncertainties that the funding sources(s) identified for my applicant share of E-rate will not be affected.			
Authorized Signer's Signature <i>Margareta Fontán Ed. D</i>		Date October 18, 2004	
Authorized School Official's Signature <i>Sor Margarita Fontán</i>		Date October 18, 2004	

Selective Review Information Request Checklist:

Remember to include all of the following in your response:

- * Copies of signed and dated contracts relating to the Form (s) 471 for all contracted services, except those contracts that are state master contracts.
- * Copies of all requests for proposals, etc., where a vehicle other than the Form 470 was used for procurement.
- * Copies of all bids that were received for all funding requests.
- * Complete documentation regarding the process used for selecting your service provider(s).
- * Copies of any consulting agreement.
- * Correspondence between the consultant/service provider and the school/library regarding the competitive bidding process and the application process.
- * Copy of your technology plan that supports your funding request for Funding Year 2004.
- * Fax Back Pages 1-4
- * Approved operating budget which includes both revenues and expenses or alternative budget documentation.
- * Letter of agency or agreement if responder is authorized representative of the eligible entity, if required.

Colegio Maria Auxiliadora
Ave. Eduardo Conde 2273
Santurce, P.R. 00915
Tel. (787) 726-8288

PRESUPUESTO OPERACIONAL 2004-2005

INGRESOS:

Matrícula	\$ 155,000.00
De matrícula para E - Rate	10,000.00
Kinder a Tercero $189 * 105 = 10,500 * 10 =$	198,450.00
Pension (elemental) $96 * 100 = 9,600 * 10 =$	96,000.00
Inter y super. $166 * 125 = 17,500 * 10 =$	207,500.00
Donativos Legislatura..... $16 * 62.50 = 1,000$	10,000.00
Donativo Bienechores	25,000.00
Don. Fundacion Angel Ramos	15,000.00
Don. Fundación BPPR	12,000.00
Actividades diferentes	65,000.00
Venta uniforme	18,000.00
Venta kiosko	40,000.00
Venta efecto escolar	1,500.00
Depart. De la fam. H. ext.	133,683.00
Otros	4,000.00
Sub Total	\$ 991,133.00
Costo de compra kiosko	27,000.00
Costo de compra mat escolar	1,700.00
Costo de compra uniforme	13,500.00
Costo prod. Catálogo	18,000.00

Ingreso total

**\$ 930,933.00 * E-rate
income
\$ 3,243.60**

GASTOS:

Salario	\$ 570,000.00
Seg. Soc.	43,300.00
Sinot	1,000.00
Fondo del seguro	8,000.00
A.E.E.	16,000.00
A.A.A.	7,000.00
Mant. casa Hermanas	42,300.00
Mant. colegio y remodelación	60,000.00
Contrucción salones (1ra face)	25,000.00
Mant. Equipos	3,000.00
Mat. Oficina	8,000.00
Gastos para E - Rate	10,000.00
Mat. de limpieza	4,000.00

*** E-rate expense
\$ 3,243.60**

Gastos de Auto	5,000.00
Serv. Prestados	38,000.00
Gastos Seguros	12,000.00
Telefono	3,000.00
Serv. Postal	1,000.00
Viajes	2,000.00
Libros y Revistas y suscripciones	5,000.00
Donativos Varios	10,000.00
Gastos para el culto	1,000.00
Plan Médico	2,500.00
Premiaciones	4,500.00
Talleres	3,000.00
Compra de Equipos	10,000.00
Gastos Miscelaneos	8,000.00
Ayuda casa inspectorial	12,000.00
Gastos de otras utilidades	7,000.00

Total gastos	\$ 921,600.00
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Remanente para operar el nuevo año	\$ 9,333.00
---	--------------------

TRANSMISSION VERIFICATION REPORT

TIME : 10/20/2004 11:56
NAME :
FAX :
TEL :

DATE, TIME	10/20 11:53
FAX NO./NAME	19735996515
DURATION	00:03:23
PAGE(S)	14
RESULT	OK
MODE	STANDARD ECM

**SUPERINTENDENCIA DE ESCUELAS
CATOLICAS**

PROGRAMA E-RATE

FAX (787) 272-0771

FACSIMILE TRANSMITTAL SHEET

TO:	FROM:
Jay Naik	Marieglorie Zapata
COMPANY:	DATE:
PLA Selective Review	10/22/2004
FAX NUMBER:	TOTAL NO. OF PAGES INCLUDING COVER:
1-973-599-6515	14
PHONE NUMBER:	SENDER'S REFERENCE NUMBER:
RE:	YOUR REFERENCE NUMBER:
COLEGIO MARIA AUXILIADORA	

☒ URGENT ☐ FOR REVIEW ☐ PLEASE COMMENT ☐ PLEASE REPLY ☐ PLEASE RECYCLE

NOTES/COMMENTS:

Enclosed are requested documents.

Marieglorie Zapata
E-Rate Administrative Assistant
e-mail: mzapata@escuelascatolicas-sj.org

USAC

Universal Service Administrative Company Schools & Libraries Division

Date: 11/03/2004

Dear Madeline Meigen,
Applicant Name (All Puerto Rico Applications you have)
Contact Number: 1-787-731-6100
Application Number(s): Multiple

The Program Integrity Assurance (PIA) team is in the process of reviewing all Form 471 Applications for schools and libraries discounts to ensure that they are in compliance with the rules of the federal universal service program. We are currently in the process of reviewing your Funding Year 2004 Form 471 Application. To complete our review, we need some additional information. The information needed to complete the review is listed below.

Madeline, we are trying to find out how you get your discount information for NSLP. I'm sure you have something different, however, we will need to have documentation for all the Schools, Public, Private, Academies, Catholic, etc., with the Total Student Enrollment and those eligible for Free (Gratis) & Reduced (Reducido) lunches.

I tried to call the E-Rate coordinator for Puerto Rico but no one spoke English.

If there is anything you can do, it will certainly speed up processing the applications. I don't know if you are the only one working on the applications for Puerto Rico, if there are others we will need a complete list of the schools with the information above.

Thanks so much for your prompt attention in this matter.

If you have already submitted the Item 21 Attachments, please fax an EXACT COPY of the Item 21 Attachments that were previously submitted. If you do not wish to resubmit the Item 21 Attachment, you are not required to do so. We will process your application once the Item 21 Attachments have been scanned into our system.

Please fax or e-mail the requested information to my attention. If you have any questions, please feel free to contact me.

It is important that we receive all of the information requested so we can complete our review. Failure to do so may result in a reduction or denial of funding.

Please send the requested information within seven calendar days. If you need additional time to prepare your response, please let me know as soon as possible.

Thank you for cooperation and continued support of the Universal Service Program.

Sincerely,

Nancy A. Rocco
Schools And Libraries Division
Program Integrity Assurance
Phone: 973-884-8250
FAX: 973-599-6522
nrocco@sl.universalservice.org

**COLEGIO MARIA AUXILIADORA****Ave. Eduardo Conde 2273****San Juan, P.R. 00915-4319****Tel. 726-8288 Fax: 727-6497**

December 10, 2004.

Schools and Libraries Division
Program Integrity Assurance

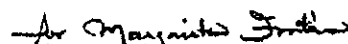
Colegio María Auxiliadora wants to certify the following information:

- | | |
|---|-----|
| 1. Total number of students enrolled | 475 |
| 2. Number of surveys/ applications sent out | 475 |
| 3. Number of surveys/ applications returned | 475 |
| 4. Total number of students qualified for NSLP
(As per the returned surveys/ applications) | 392 |
| 5. Are the surveys/ applications and results kept on file? | YES |

"I certify that only those students who meet the Income Eligibility Guidelines of the National School Lunch Program have been included in Column 5 Item 10b of Block 4 (worksheet A) of the Form 471".

Enclosed is a copy of the survey applied.

Cordially,


Sor Margarita Fontán, FMA
Director

mza

Colegio Maria Auxiliadora
Ave. Eduardo Conde #2273, San Juan, P.R. 00915-4319
Tel. 726-8288 Fax- 727-6497



ESTUDIO SOCIO ECONOMICO-AÑO ESCOLAR 2003-2004

1. Región Educativa SAN JUAN
2. Distrito Escolar SAN JUAN II
3. Escuela COLEGIO MARIA AUXILIADORA
4. Nombre del estudiante [illegible]
5. Grado Segundo
6. Nombre del Padre o encargado Barthelme Brooks
Ocupación N/A
7. Nombre de la madre Janet Cruz Canasquillo
Ocupación ayudante
8. Total de ingreso anual familiar 10,656.00
9. Total de miembros de la familiar 3

Certifico correcto

Janet Cruz
Firma del Padre o Encargado

4/29/03
Fecha

[illegible]
Firma del Administrador/a de Finanzas

EXHIBIT F



Universal Service Administrative Company
Schools & Libraries Division

CASE SR-2004-BEN-200291

Date: January 24, 2005

To: Madeline Melgen
E-Mail: mmelgen@escuelascaticas-sj.org
Entity: 200291 Colegio Maria Auxiliadora
Fax #: 787-731-0000
Phone: 787-731-6100
Sender: Carlos Alvarez
Phone: 973-560-4410
Fax: 973-599-6515
Subject: Funding year 2004 Selective Review Follow-Up Questions

*** **

Please fax or e-mail the requested information to my attention. If you have any questions please feel free to contact me.

It is important that we receive all of the information requested so PIA can complete its review. **If you are unable to provide the requested information because your school has closed or will shortly close for summer break, please let me know when you will be available to respond to these questions. Failure to do so may result in a reduction or denial of funding.**

If we do not receive the information within seven calendar days, your application will be reviewed using the information currently on file. If you need additional time to prepare your response, please let me know as soon as possible.

1. Professional development:

- Please provide a one-page summary of the resources and strategies you have for professional development addressing the questions listed below.
 - Do you have a training staff?
 - Who provides the training?
 - Who receives the training and what are they trained on?
 - Is a train-the-trainer mode of training used?
 - Are there Education Service Agencies that provide training?

Please do not hesitate to call me, should you have any questions. Thank you for your cooperation and remember that any information requested must be faxed or e-mailed within 7 calendar days from today. If you need additional time to prepare your response,

please let me know as soon as possible. If you are going to send e-mail to me, please make sure that at the end of your e-mail you have your Full Name and Official Title.

Thank you,

Carlos Alvarez
Associate Manager - SLD
Phone: 1-973-560-4410
Fax: 1-973-599-6515
Email: calvare@sl.universalservice.org



80 South Jefferson Road
Whippany, New Jersey 07981
Fax: 973-599-6515

Universal Service Administrative Company
Schools & Libraries

FAX TRANSMISSION COVER SHEET

To: Madeline Melgen
Fax: 17877310000
Subject: RE E RATE SELECTIVE REVIEW CASE # FY -2004-200291
From: PIAIntegrated
Date: January 24, 2005
Time: 9:03:50 AM

YOU SHOULD RECEIVE 4 PAGE(S), INCLUDING THIS COVER SHEET. IF YOU DO NOT RECEIVE ALL THE PAGES, PLEASE CALL THE CONTACT SPECIFIED BELOW.

Dr. Melgen,

See attached letter for additional information needed in order to complete the review of the application for **Colegio Maria Auxiliadora (BEN 200291)**.

Please do not hesitate to call me, should you have any questions. Thank you for your cooperation and remember that any information requested must be **faxed or e-mailed within 7 calendar days from today**. If you need additional time to prepare your response, please let me know as soon as possible. If you are going to send e-mail to me, please make sure that at the end of your e-mail you have your Full Name and Official Title.

Thank you,

Privilege and Confidentiality Notice

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Carlos Alvarez

Associate Manager - SLD

Phone: 1-973-560-4410

Fax: 1-973-599-6515

Email: calvare@sl.universalservice.org

EXHIBIT G



Universal Service Administrative Company

Schools & Libraries Division

CASE SR-2004-BEN-200291

Date: February 14, 2005

To: Madeline Melgen
E-Mail: mmelgen@escuelascaticas-sj.org
Entity: 200291 Colegio Maria Auxiliadora
Fax #: 787-731-0000
Phone: 787-731-6100
Sender: Carlos Alvarez
Phone: 973-560-4410
Fax: 973-599-6515
Subject: Funding year 2004 Selective Review Follow-Up Questions

*** **

Please fax or e-mail the requested information to my attention. If you have any questions please feel free to contact me.

It is important that we receive all of the information requested so PIA can complete its review. **If you are unable to provide the requested information because your school has closed or will shortly close for summer break, please let me know when you will be available to respond to these questions. Failure to do so may result in a reduction or denial of funding.**

If we do not receive the information within seven calendar days, your application will be reviewed using the information currently on file. If you need additional time to prepare your response, please let me know as soon as possible.

* {

In your response to our request for information (SRIR), the signer of the Fax Back Page 4 (certification page) is Sor Margarita Fontan, but the signer of the agreement between the school and the Consorcio is Sor Maritza Ortiz. Please explain.

Please do not hesitate to call me, should you have any questions. Thank you for your cooperation and remember that any information requested must be faxed or e-mailed within 7 calendar days from today. If you need additional time to prepare your response, please let me know as soon as possible. If you are going to send e-mail to me, please make sure that at the end of your e-mail you have your Full Name and Official Title.

Thank you,

Carlos Alvarez
Associate Manager - SLD
Phone: 1-973-560-4410
Fax: 1-973-599-6515
Email: calvare@sl.universalservice.org



80 South Jefferson Road
Whippany, New Jersey 07981
Fax: 973-599-6515

Universal Service Administrative Company
Schools & Libraries

FAX TRANSMISSION COVER SHEET

To: Madeline Melgen
Fax: 17877310000
Subject: RE E RATE SELECTIVE REVIEW CASE # FY 2004-200291
From: PIAIntegrated
Date: February 14, 2005
Time: 11:00:48 AM

YOU SHOULD RECEIVE 4 PAGE(S), INCLUDING THIS COVER SHEET. IF YOU DO NOT RECEIVE ALL THE PAGES, PLEASE CALL THE CONTACT SPECIFIED BELOW.

Attached is a document asking for additional information in support of the Selective Review taking place at your billed entity level. Please note that you have 7 days in which to provide this information. Response Due Date is no later than 2/21/05.

Additional information is needed in the following areas:

- 1) **Fax Back Page 4 – Certification page**- See attached letter for information needed.

It is important that we receive all of the information requested within 7 calendar days of the date of this document so that we may complete our review of your funding request(s). If we do not receive the requested information within seven calendar days, this Selective Review will be processed using the information currently

Privilege and Confidentiality Notice

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on file. If you need additional time to prepare your response, please let me know as soon as possible.

Please call me at 973-560-4410 or email to the address below to confirm receipt of this fax/email.

Please see attached request for documentation requested and confirm receipt. Thank you for your assistance.

Carlos Alvarez

Selective Review

Schools and Libraries Division

Phone: 973 560 4410

FAX: 973 599 6515

Email: calvare@sl.universalservice.org



Universal Service Administrative Company
Schools & Libraries Division

FUNDING COMMITMENT DECISION LETTER

(Funding Year 2004: 07/01/2004 - 06/30/2005)

May 10, 2005

Madeline Melgen Ed D
Colegio Maria Auxiliadora
Road 177 Building 2021
Camino Alejandrino
Guaynabo, PR 00969-5140

Re: Form 471 Application Number: 423955
Funding Year 2004: 07/01/2004 - 06/30/2005
Billed Entity Number: 200291
Applicant's Form Identifier: IC200291

Thank you for your Funding Year 2004 E-rate application and for any assistance you provided throughout our review. Here is the current status of the funding request(s) featured in the Funding Commitment Report at the end of this letter.

- The amount, \$2,276.00 is "Denied."

Please refer to the Funding Commitment Report on the page following this letter for specific funding request decisions and explanations.

The Important Reminders and Deadlines immediately preceding this letter are provided to assist you throughout the application process.

NEXT STEPS

- Review technology planning approval requirements
- Review CIPA Requirements
- File Form 486
- Invoice the SLD using the Form 474 (service providers) or Form 472 (Billed Entity)

FUNDING COMMITMENT REPORT

On the pages following this letter, we have provided a Funding Commitment Report for the Form 471 application cited above. The enclosed report includes a list of the Funding Request Number(s) (FRNs) from your application. The SLD is also sending this information to your service provider(s) so preparations can be made to begin implementing your E-rate discount(s) after you file your Form 486. Immediately preceding the Funding Commitment Report, you will find a guide that provides a definition for each line of the Report.

TO APPEAL THIS DECISION:

If you wish to appeal the decision indicated in this letter, your appeal must be received by the SLD or postmarked within 60 days of the date of this letter. Failure to meet this requirement will result in automatic dismissal of your appeal. In your letter of appeal:

1. Include the name, address, telephone number, fax number, and e-mail address (if available) for the person who can most readily discuss this appeal with us.
2. State outright that your letter is an appeal. Identify which Funding Commitment Decision(s) you are appealing. Indicate the relevant funding year and the date